

FINANCIAL POISE WEBINAR SERIES INVESTING BASICS 2016

SERIES OVERVIEW

Are you saving enough money? How much is enough? That depends, in part, on what your goals are and what sort of returns you can get by investing your savings. Many investors who thought they were well situated for retirement were devastated by the 2008 meltdown. Many others in recent years have lost their entire nest egg to fraudulent schemes. This Financial Poise webinar series will give you a solid introduction to the fundamentals of investing.

As with all Financial Poise webinars, each episode in the series is designed to be viewed independently of the other episodes, and listeners will enhance their knowledge of this area whether they attend one, some, or all of the programs.

EPISODE SUMMARIES

EPISODE #1

Basic Investment Principles 101 - From Asset Allocations to Zero Coupon Bonds

January 28, 2016, 11am CST

Alpha. Alternatives. Annuities. Asset Allocation. Bonds. Broker. Correlation. CFP. Compounding. Crowdfunding. Diversification. Expense Ratios, Fixed Income Securities. Hedge Funds. Mutual Funds. Insurance. P/E Ratio. Private Equity Funds. Rebalancing, RIA. Risk. Risk/reward. Stocks. . Time value of money. Value Investing, Venture Capital. Z Scores Zero Coupon Bonds. These are just some of the terms that this Financial Poise webinar lays out while explaining the basic concepts that every investor should know and understand. We try to touch on each of these concepts in this his Financial

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EPISODE #2

Goal Based Investing- Planning for Key Life Events

February 22, 2016, 11am CST

Planning to buy your first house, send your child to college, take care of your elderly parents, or plan for your own retirement? - these are examples of some specific events one may save for. Goals-based investing (also known, in its most basic form, as the “envelope system”) is an investment strategy where performance is measured by the success of investments in meeting specific personal and lifestyle goals rather than meeting some specified investment benchmark. Join Financial Poise faculty as they explain, in plain English, the pros and cons of goals based investing and ways it may make sense to incorporate the strategy into your own financial planning.

EPISODE #3

The Legal & Tax Aspect of Investing: asset protection; estate planning, and tax efficiency

March 17, 2016, 11am CST

Are your assets titled in a way that makes them “tax efficient?” Do you have an estate plan, and if so is it the right one for you? Are your assets protected from the reach of creditors as well as they can be and is that something you should be concerned about in the first place? This webinar discusses these issues in the context of your broader financial planning.

EPISODE #4

Advanced Investing Topics

April 21, 2016, 11am CST

Commodities. Crowdfunded securities. Derivatives. Options. These are just some examples of “alternative assets” that you can invest in besides stocks, bonds, or cash. Should you consider them? This webinar explains the basics of some asset types and investment strategies that are more complicated than buying stocks, bonds, and mutual funds and explains how they may- or may not be- appropriate as part of a broader portfolio.

EPISODE #5

Options for the Accredited Investor

May 26, 2016, 11am CST

Hedge funds, private equity funds, private placements, and venture capital funds: these are examples of “alternative assets,” which can only be invested in by “accredited investors.” You are probably an accredited investor if you earn more than \$200,000 (\$300,000 if you are married and file a joint tax return) or if you are worth at least \$1 million (not including the equity of your primary residence). If you are an accredited investor *should* you invest in alternative assets? If you decide you should, *how* do you go about it? This webinar helps to answer these questions.